

Pershing in Mexico: A Case Study in Limited Contingency Operations

A Monograph

by

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Abstract

Pershing in Mexico: A Case Study in Limited Contingency Operations, by MAJ Timothy J. Lawrence, 44 pages.

In the early morning of 9 March 1916, Pancho Villa led five hundred men in an attack on Columbus, New Mexico and neighboring US Army Camp Furlong manned by the 13th US Cavalry Regiment. The raid only lasted about three hours but resulted in much of the town destroyed and seventeen US soldiers and civilians dead. President Woodrow Wilson did not trust the Carrancista government, the current power in Mexico, to capture the raiders and instead directed newly promoted Brigadier General John Pershing to command an expedition into Mexico in order to break up Villa's band. Pershing's 4,500 strong force set out on its mission only six days after the Villa raid to achieve its limited objective within in an inhospitable, foreign country. The 1916 Punitive Expedition is a historical example of what modern doctrine calls a limited contingency operation. The military conducts these operations to achieve limited policy goals in order to protect US interests or prevent further conflict. A commander of a limited contingency operation must control the scope of the conflict and primacy of policy considerations in order to maintain the limited nature of the conflict. Pershing managed the scope of the operation by controlling the rate of escalation and informed policy makers by recognizing significant changes in the operational environment. Pershing accomplished all of this within a strategic and operational environment that reflects in the environment today's leaders envision for the near future.

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Introduction

An organized military attack against a US town and an army post, the largest in contemporary memory, has just occurred and the US public is clamoring for the president to seek retaliation. The attacker's safe haven resides within a nation gripped by a violent revolution and harboring animosity against the United States. With an upcoming election, the president does not want to appear weak on foreign policy, but also does not want to risk involvement in a larger conflict. The president directs the US Army to send a combined arms force into a foreign nation, avoid initiating a war, and kill or capture the leader of the attack. The army quickly finds itself in an inhospitable environment occupied by a population that is primarily concerned with survival and is more inclined to support the individual the expedition targets than the expedition itself. This all conducted, while politicians in each nation posture themselves to present a strong image to their respective national audiences.

This does not describe a contemporary military operation to kill the leader of an extremist group somewhere on the globe. Instead, it describes a situation the United States faced in 1916. In the early morning of 9 March 1916, Pancho Villa led five hundred men in an attack on Columbus, New Mexico and neighboring US Army post, Camp Furlong, occupied by 350 troopers of the Thirteenth United States Cavalry. The raid lasted about three hours, but when Villa retreated to Mexico, he left over 150 of his own force dead as well as seventeen US soldiers and civilians dead and another seven wounded.¹

President Woodrow Wilson did not trust the Carrancista government, the current power in Mexico, to capture the raiders and instead directed newly promoted Brigadier General John Pershing to command an expedition into Mexico in order to break up Villa's band. Pershing's 4,500 strong force set out on its mission only six days after the Villa raid to achieve its limited objective. Over the course of the next three months, Brigadier General Pershing and his combined

¹ Benjamin Runkle, *Wanted Dead or Alive: Manhunts from Geronimo to Bin Laden* (New York: Palgrave Macmillan, 2011), 81-82.

arms command demonstrated how a small force could operate, unwelcome, in a foreign nation and avoid escalating the conflict.²

In 1975, then Command and General Staff College student and 1965 graduate of the United States Military Academy, Captain John Thompson recognized significant value in the Punitive Expedition for military leaders. He specifically observed that planners for US involvement in Vietnam failed to learn from the United States experience in Mexico. Thompson's recognition of value for planners in 1975 is just as true today. The 1916 Punitive Expedition is useful for modern military leaders to study because it demonstrates the interaction between government policy and military strategy in employing a limited contingency operation. Policy makers in Washington set goals for the operation in dialogue with army leadership. Then in execution, Pershing managed the scope of the operation by controlling the rate of escalation and informed policy makers by recognizing significant changes in the operational environment. Pershing accomplished all of this within a strategic and operational environment that reflects in the environment today's leaders envision for the near future.³

General Martin Dempsey's 2015 National Military Strategy describes the strategic environment he envisions today and in the future. Two parallels exist between the environment Dempsey describes and that facing President Wilson and army leadership in 1916. The first is the growth of an information environment that enables rapid communication over a wide region. Today, this refers to the internet and technologies such as smartphones. A similar information environment existed in 1916. Telephone and telegraph enabled observers to describe an attack as it occurred. President Wilson, in Washington, DC, often learned about actions in Mexico before

² Wilfred P. Deac, "Manhunt for Pancho Villa," *Military History* 19, no. 5 (December 2002): 50; John J. Pershing, "Report of the Punitive Expedition," 10 October 1916, Combined Arms Research Library, Fort Leavenworth, KS, 3.

³ John C. Thompson, "Pershing's Punitive Expedition: An Overview with Suggestions for Further Study" (Fort Leavenworth, KS: Command and General Staff College, 1975), Combined Arms Research Library Digital Library, accessed 31 August 2015, <http://cgsc.contentdm.oclc.org/cdm/singleitem/collection/p4013coll2/id/2284/rec/1>.

Pershing. A second parallel with 1916, are rival nations that do not seek a direct military conflict, yet still pose security concerns. Dempsey's examples are Russia, Iran, North Korea, and China. While the threat posed by Mexico to the United States in 1916 was not as severe as that posed by some of these nations today, the instability due to the Mexican Revolution coupled with the Mexican government's inability to control its border with the United States, meant that attacks along the border region were common. Then as today, military leaders must be able to navigate through these challenges in order to execute limited contingency operations⁴

Limited contingency operations occupy the center of the military's range of operations from military engagement, security operations, and deterrence to major operations and campaigns. The president can initiate a limited contingency operation in order to "ensure the safety of American citizens and US interests." The key characteristics of these operations are their initial response, scope, economy of force, and the political aspects. The deployed military leader can directly shape the scope of the conflict and ensure military actions support stated policy objectives.⁵

Hew Strachan, a British military historian and member of the Strategic Advisory Panel on the British Defense Staff, in *Direction of War* provides a clear understanding of the relationship between policy and strategy. Strachan defines policy as a government's intent and leaves strategy primarily in the realm of action, applying means to ends. The most important is the relationship between the two as Strachan describes:

⁴ Joint Chiefs of Staff, "The National Military Strategy of the United States of America," June 2015, 1-3, accessed 1 October 2015, http://www.jcs.mil/Portals/36/Documents/Publications/2015_National_Military_Strategy.pdf; Herbert Molloy Mason, *The Great Pursuit* (New York: Random House, 1970), 23; Clarence C. Clendenen, *Blood on the Border: The United States Army and the Mexican Irregulars* (New York: Macmillan, 1970), 296-297; Friedrich Katz, *The Life and Times of Pancho Villa* (Stanford, CA: Stanford University Press, 1998), 550-557; Robert L. Scheina, *Villa: Soldier of the Mexican Revolution* (Dulles, VA: Brassey's, 2004), 93-94.

⁵ Joint Publication (JP) 3-0, *Joint Operations* (Washington, DC: Government Printing Office, 2011), 5-1, 5-19-20.

In the ideal model of civil-military relations, the democratic head of state sets out his or her policy, and armed forces coordinate the means to enable its achievement. The reality is that this process – a process called strategy – is iterative, a dialog where ends also reflect means, and where the result – also called strategy – is a compromise between the ends of policy and the military means available to implement it.

Essential to Strachan's understanding is the dialogue between policy makers and strategic planners. They do not have a linear relationship where policy directs strategy and then strategy executes. They interact; strategy informs policy of the possible while policy directs strategy. Strachan provides an effective lens through which to view the policy and strategy at play in 1916. Pershing's success in the campaign largely generated from his ability to ensure his military actions responded to and informed policy, but did not try to direct it.⁶

Literature Review

As Captain Thompson noticed in 1975, US military history largely relegates to obscurity the 1916 Punitive Expedition due its perception of failure and the larger United States involvement in the First World War in 1917. Despite this, several authors wrote on the Punitive Expedition from personal experience or detailed research. The literature reviewed here, while by no means exhaustive, includes the seminal studies conducted on the campaign. The literature falls into two broad categories. The first are those works published immediately following the campaign and during the interwar years between 1919 and 1940. The authorship consists largely of military officers, many of whom served with Pershing in Mexico. The officers that published their work in 1916 and 1917, while still on campaign, used the *Journal of the United States Cavalry Association* as a venue to communicate recommendations to their peers in the United States for improving cavalry equipment. After the First World War, army officers wrote about the Punitive Expedition as a means for defending the future of the cavalry branch as an essential capability for the army and the nation. The second category, consisting of historical narratives,

⁶ Hew Strachan, *The Direction of War: Contemporary Strategy in Historical Perspective* (New York, NY: Cambridge University Press, 2013), 12-13, 45.

did not emerge until much later in the twentieth century. These histories conveyed personal stories of soldiers during the campaign. They also provided a Mexican perspective of the expedition within the context of the Mexican Revolution. Their analysis of the campaign at the strategic and political level is beneficial. What is absent from the body of research is a study of operational planning and leadership. This is the analysis that is most useful to a modern military professional.⁷

Professional military journals emerged out of the mid nineteenth century as a venue for military leaders to share thoughts and challenge ideas within the military. Founded in the 1870s, the *Cavalry Journal* was in its twenty-fourth year of publication by the time of Villa's raid. Recognized by modern historians as one of the best military journals in the world, the publication contained articles on employment of cavalry in combat, its organization, and training. The leaders of the Punitive Expedition played a significant part in this reputation with the articles they provided to the journal, even while still deployed in Mexico.⁸

First Lieutenant George S. Patton, Pershing's aide-de-camp during the campaign, wrote from Mexico "Cavalry can fight anywhere except at sea and only the fact that the horse is not web-footed restricts its prowess even there." While Patton's humorous aside on the potential use of cavalry at sea was farfetched, the sentiment from his 1917 article in the January edition of the *Journal* reflected that of many of his fellow officers and authors. The focus in these early accounts of the campaign on the capability of the cavalry was a response to government leaders questioning the future of cavalry in light of the war in France and, later, a tightening budget. The topics found within this literature demonstrate how cavalry leaders defended their branch. They

⁷ Thompson, "Pershing's Punitive Expedition," 1.

⁸ Robert M. Cassidy, "Prophets or Praetorians? The Uptonian Paradox and the Powell Corollary," *Parameters* 33, no. 3 (August 2003): 132; Dennis Showalter, "The U.S. Cavalry: Soldiers of a Nation, Policemen of an Empire," *Army History* 11, no. 81 (2011): 18-19.

wrote about the expedition to argue that US cavalry troopers were versatile, and capable of exercising restraint when required.⁹

The most commonly found topic in the work published immediately following the campaign and the years before the Second World War were accounts of cavalry troopers overcoming adversity to accomplish their missions. Army authors lionized the officers and soldiers of the US cavalry. Some did this as a means of memorializing the sacrifices of soldiers with whom they served. Others used the exploits of cavalymen in Mexico to emphasize the value of a cavalry trooper to the US Army. Captain Lewis Morey's account of his regiment's actions during the Carrizal fight highlighted the bravery and steadfastness of his troopers in a fight with a larger Mexican force. Colonel Frank Tompkins' account of the expedition, written in 1934, described the exploits of individual cavalry troopers such as Sergeant Mark Dobbs, who, during the Columbus raid displayed "a sense of duty so high that he chose to serve his gun until death." Colonel Harry Toulmin's book, published in 1935, was a direct appeal to Congressional leaders on the importance of cavalry. Toulmin, not a participant himself in the campaign, wrote that the "integrity, professional skill, and loyal devotion" to the US Government of the officer corps cannot overcome insufficient funding for equipment and training. He continued to heap praise on the cavalry leaders throughout the book, stressing their skill as combat leaders. One example is Major Tompkins after the Thirteenth Cavalry's fight against the Mexican forces in Parral. Toulmin described Tompkins as "a fine personal example of bravery, and with a superb grasp of the tactical situation, of which he made the most."¹⁰

⁹ George S. Patton, "Cavalry Work of the Punitive Expedition," *The Journal of the U.S. Cavalry Association* 27, no. 113 (January 1917): 426; Jonathan M. House, *Toward Combined Arms Warfare: A Survey of 20th Century Tactics, Doctrine, and Organization* (Fort Leavenworth, KS: Combat Studies Institute, 1984), 76.

¹⁰ Lewis S. Morey, "The Cavalry Fight at Carrizal," *Journal of the U.S. Cavalry Association* 27, no. 113 (January 1917): 456; H. A. Toulmin Jr., *With Pershing in Mexico* (Harrisburg, PA: Military Service Publishing, 1935), xiii, 65.

Army leaders also wrote on the versatility and restraint of the US cavalry within their histories of the Punitive Expedition. Captain Orlando Troxell, with the Tenth Cavalry throughout the campaign, described his experiences with the second squadron and the machine gun troop. He highlighted the versatility of the cavalry by its ability to operate for long periods away from any supply base. His soldiers operated from 20 March to 22 April 1916 without any US supplies, living entirely off the land, covering over 750 miles in just twenty-eight days. Toulmin noted in his history that the most commendable achievement of the expedition was accomplishing its mission while not bringing on a larger war with Mexico. He credited that achievement to restraint in individual officers such as Major Tompkins who used a balanced response to the Mexican Army attack at Parral to both prevent expansion of the battle and maintain the unity of his command in an orderly withdrawal.¹¹

Historians researched and published on the Punitive Expedition in the latter half of the twentieth century. These authors compose the second significant category of literature on the campaign. The first motivation for several of these authors was the human-interest aspect of the Punitive Expedition. Other authors chose to tell the story of the campaign as part of the larger narrative of the Mexican Revolution, offering different perspectives of the campaign. The final topic in recent literature is an analysis of the campaign focused on the US strategic and foreign policy in dealing with Mexico and the ongoing war in Europe.

The literature on the subject after the Second World War marked a shift in focus. In 1954, coming out of the war in Korea, the US Army War Histories Division turned to the Punitive Expedition for a study of the army in a limited conflict. Robert Thomas and Innez Allen wrote a narrative of the campaign in order to capture key benefits of the experience for the army and the nation in light of the recent experience with limited warfare in Korea. At the height of the

¹¹ Orlando C. Troxel, "The Tenth Cavalry in Mexico," ed. Ezra B. Fuller, *Journal of the U.S. Cavalry Association* 28, no. 116 (October 1917): 199-208; Frank Tompkins, *Chasing Villa* (Harrisburg, PA: Military Service Publishing, 1934), 54; Toulmin, *With Pershing in Mexico*, 66.

Vietnam War, Clarence Clendenon published *Blood on the Border*, in 1969, expanding on the work from Thomas and Allen. Clendenon sought to shed light on a little known subject on which many were “amazingly misinformed.” A year later, Herbert Mason published *The Great Pursuit*. His book contains several detailed accounts of individual soldiers and leaders experiences during the campaign and the confrontations such as the Columbus raid and Carrizal fight. Paul Vanderwood and Frank Samponaro’s *Border Fury* is a narrative with a unique perspective of the campaign. They told the story of the campaign through the eyes of the photographers that travelled with Pershing and the army using several hundred picture postcards to tell the story of US soldiers and Mexicans in 1916. These works focused on the story of the campaign but provided little analysis.¹²

A second theme found in the literature placed the expedition within the larger context of the Mexican Revolution and considered the Mexican view of Pershing’s Expedition. One of the first authors do to this was Clendenon. Years before he published *Blood on the Border*, Clendenon told the story of US foreign policy during the Mexican Revolution from 1910 to 1920. He took a US perspective throughout his analysis but in describing the strategic discourse between US and Mexican leaders he shed light on individual revolutionaries such as Villa and Carranza in a way military histories and literature had not. A second work to consider the United States’ involvement in Mexico is *Intervention* by John Eisenhower. *Intervention* highlights the interaction between the US and Mexico during the Mexican Revolution through the lenses of both US and Mexican leaders focused on armed and diplomatic interventions that occurred during the time period. James Stout’s *Border Conflict* is an account of the Expedition with emphasis on the

¹² Robert S. Thomas and Inez V. Allen, *Mexican Punitive Expedition Under Brigadier General John J. Pershing, 1916-1917* (Washington, DC: Office of the Chief of Military History, 1958), 5-11; Clendenon, *Blood on the Border*, xv-xviii; Mason, *The Great Pursuit*, 3-23; Paul J. Vanderwood and Frank N. Samponaro, *Border Fury: A Picture Postcard Record of Mexico’s Revolution and U. S. War Preparedness, 1910-1917* (Albuquerque: University of New Mexico Press, 1988), vii-viii; James W. Hurst, *Pancho Villa and Black Jack Pershing: The Punitive Expedition in Mexico* (Westport, CT: Praeger, 2008).

Mexican Army under Carranza operating in Chihuahua in 1916 in order to establish control over the province and eliminate Villa and his band. In his analysis, Stout offers the Mexican perspective of the political environment and sheds light on the motivations of the men that followed Villa. Unique to Stout's work, he contends that Carranza's greater concern in 1916 was catching Villa not driving Pershing out of Mexico. The literature examining the relationship between the United States and Mexico during the conflict demonstrates a shift from a tactical narrative of US soldiers in Mexico to a strategic study.¹³

While several studies of the tactical conduct of the Punitive Expedition exist, analyses of the conduct of the operation or its guiding policies are significantly lacking. James Hurst's *Pancho Villa and Black Jack Pershing* demonstrates how Pershing's operation was successful when "judged by the criteria of its orders" to break up the band that raided Columbus. He identified, as a key to Pershing's success, his use of mobile cavalry to pursue Villa and his men. The second author is Benjamin Runkle. In *Wanted Dead or Alive*, Runkle considers the Punitive Expedition as a case study, among others, of a strategic manhunt. He defined a strategic manhunt as "the deployment of American military forces abroad for a campaign in which the operational objective is to capture or kill one man." Runkle offers policy recommendations for modern leaders based on his study of strategic manhunts. Each of these authors offers useful analysis, Hurst on the tactical actions in the campaign and Runkle of policy during a "strategic manhunt." What they and other authors have overlooked, however, is an analysis of Pershing's operational planning and leadership. How did Pershing shape his operational environment both within and outside of his command to ensure that tactical actions did not overcome policy objectives?¹⁴

¹³ Clarence C. Clendenen, *The United States and Pancho Villa: A Study in Unconventional Diplomacy* (Ithaca, NY: Cornell University Press, 1961), v-vii; John S. D. Eisenhower, *Intervention!: The United States and the Mexican Revolution, 1913-1917* (New York: W. W. Norton, 1995), xi-xii; Joseph A Stout, *Border Conflict: Villistas, Carrancistas, and the Punitive Expedition, 1915-1920* (Fort Worth: Texas Christian University Press, 1999), ix-x.

¹⁴ Hurst, *Pancho Villa and Black Jack Pershing*, ix-x; Runkle, *Wanted Dead or Alive*, 4.

Background of the Conflict

United States and Mexico prior to the 1910 Mexican Revolution

An analysis of Pershing's planning and leadership in Mexico is not possible without first considering the complexity of the strategic context in which his organization operated. Violence, distrust, and racism characterized the environment on the two thousand mile border between the United States and Mexico and the relationship between the governments in the first decades of the twentieth century. Violent raids, originating from both sides of the border, terrorized local inhabitants from the early nineteenth century into the twentieth. A war had ended with a US Army occupying Mexico City in 1847 and over matters of honor and security of national interests, the US military occupied Mexican coastal cities in 1914. It is not surprising that Pershing's force did not find a welcoming Mexican population in 1916. Pershing navigated a tense political environment characterized by a violent past, to accomplish his mission and avoid war.¹⁵

The nature of the political relationship between the United States and Mexico and that of its citizens in the border region began in the early nineteenth century. The first significant clash between Americans and Mexicans occurred in the 1835 war for Texas Independence. The brutality of the Mexican Army against the Texians at the Alamo and the less familiar massacre at Goliad, where General Antonio Lopez de Santa Anna ordered the execution of 365 Texian prisoners of war, instilled antagonism for Mexico in the US population and represented merely the early development of a history of violence in the border region.¹⁶

¹⁵ Clendenen, *Blood on the Border*, 1.

¹⁶ Michael C. Meyer, William L. Sherman, and Susan M. Deeds, *The Course of Mexican History*, 9th ed. (New York: Oxford University Press, 2010), 252-255.

That antagonism manifested itself in war between the nations in 1846. The United States annexation of Texas in 1845 led to Mexico severing diplomatic relations between the nations. As tensions grew, the final act to lead to war came in May 1846 when a Mexican cavalry patrol attacked a US patrol in Texas. Congress declared war and dispatched an army to Mexico, which occupied its capital in 1848. The end of the war left a legacy of hostility in Mexico toward the United States. Mexicans and Americans pointed to racial faults in each as the cause of the war and created a deep “Yankeeophobia” in Mexico that would have implications on future interactions between the governments.¹⁷

Civilians living in the harsh borderland between the US and Mexico in the nineteenth century suffered from violence as a result of interstate war, but even more so as a result of conflict between themselves and the Native Americans. The 1848 Treaty of Guadalupe Hidalgo that ended the Mexican War included an article in which the US government pledged to restrain the “savage tribe” that occupied the newly gained territory, from raiding into Mexico. The savagery of these border raids in the 1830s and 1840s by Native American tribes in modern day Arizona and New Mexico resulted in “a thousand deserts.” Mexican villages became barren land after Native American raids killed, kidnapped, or drove out their inhabitants. The toll in deaths in the region resulting from these raids and reprisals by the Mexicans reached tens of thousands. Raids occurred and originated from both sides of the Rio Grande. Settlers in the region called for help from their state and federal governments. The level of responses varied, however; the only military successes occurred when US and Mexican forces coordinated their efforts.¹⁸

These agreements gave permission for each nation to cross the border in pursuit of raiders, for a limited time period. Large attacks from Indian tribes along the border region ended

¹⁷ Meyer, Sherman, and Deeds, *The Course of Mexican History*, 255-262.

¹⁸ Brian DeLay, *War of a Thousand Deserts* (New Haven, CT: Yale University Press, 2008), xiii-xxi.

in the final decades of the nineteenth century when the United States and Mexico each defeated the most violent tribes. The onset of the Mexican Revolution in 1910 brought in new bandit leaders, new Mexican governments, a spike in racially charged violence, and with them new tensions between the United States and Mexico.¹⁹

Revolution and the US Strategic Environment after the Columbus Raid

The Mexican Revolution began in November 1910 when Francisco Madero, a well-educated political exile in San Antonio, Texas, released the Plan de San Luis Potosi from San Antonio, Texas. The revolution grew out of grievances from across the Mexican population against the near dictatorial regime of Porfirio Diaz. Diaz's policies marginalized business owners who wanted to modernize business practices and exploited the landless and urban workers. The diversity of grievances made retaining power for any revolutionary leader challenging. Through the course of the revolutionary period, three different leaders claimed leadership of Mexico. They each sought to consolidate power in their bases of support and used military force to control rebellious territories. They also turned to the United States for diplomatic recognition and the weapons that came with it. President Woodrow Wilson's foreign policy in Mexico during the revolution set the stage for Pershing's expedition.²⁰

Madero, the first national leader of the Mexican revolution, received strong initial support throughout the Mexican population. Their widely diverse grievances, however, were nearly impossible for Madero to rectify and his inability to meet expectations led to a drop in backing.

¹⁹ DeLay, *War of a Thousand Deserts*, 65; Shelley Bowen Hatfield, *Chasing Shadows: Indians along the United States-Mexico Border 1876-1911* (Albuquerque: University of New Mexico Press, 1998), 8-11.

²⁰ Thomas A. Bruscino, "A Troubled Past: The Army and Security on the Mexican Border, 1915-1917," *Military Review* 88, no. 4 (July 2008): 31-44; Meyer, Sherman, and Deeds, *The Course of Mexican History*, 367-368; Paul Hart, "Beyond Borders: Causes and Consequences of the Mexican Revolution," in *War Along the Border: The Mexican Revolution and Tejano Communities*, ed. Arnolando De Leon (College Station: Texas A&M University Press, 2012), 8-9.

This coupled with his naïve decision to allow his rivals to maintain positions of power created the opportunity for Victoriano Huerta, an army general and Diaz supporter, to lead a counter-revolution, overthrow, and order the assassination of President Madero, his brother, and supporters in February 1913.²¹

Huerta's violent rise to power and suppression of those who opposed him did not win him loyalty. Huerta, much like Madero and Diaz before him, could only maintain control of areas of Mexico that his forces could reach. This meant that in the northern states, separated from Mexico City by distance and mountains, local warlords held power and any central government control resulted from their acquiescence. The largest uprisings came from the north led by Venustiano Carranza in Coahuila and Francisco "Pancho Villa" in Chihuahua. Emiliano Zapata led a third rebellion in Morelos, south of Mexico City.²²

The most successful and final of the three national leaders, Venustiano Carranza, eventually became the "First Chief" of Mexico. Carranza came from a land owning family in Coahuila. He rose as a revolutionary leader for altruistic goals of ending debt peonage and land reform. Carranza became a powerful leader early in the revolution as the governor of his home state and leader of the revolution in the north, including Chihuahua.²³

A supporter of Carranza's was Francisco "Pancho" Villa. He was born in 1878 in Durango to a sharecropping family. Legend and myth generated by Villa and his followers shroud his early years. History records that Villa had four siblings and his father died young. Beyond that, his growth from humble beginnings and rise as a bandit splits into different legends that include stories of murder. Some legends describe his pre-revolutionary days as a modern Robin Hood who only stole as needed for the common person. The movement in the north of Mexico

²¹ Eisenhower, *Intervention!*, xiii.

²² Ibid., xiv, 39.

²³ Hart, "Beyond Borders," 21.

with Carranza and Villa as its leaders was not the only movement in the Mexican Revolution, but it was the most influential. Then, under the control of Villa, it was the most militant.²⁴

Villa managed to gain support from a wide spectrum of US society, including military leaders and the federal government. Many of them saw him as the leader who could potentially end the violence in Mexico. Villa won admiration in the United States for his apparent love of democracy and the common people. His statements to the American press that professed his desire for peace in Mexico, “such peace as you have in the United States where all men are equal before the law” appealed to the public and political leadership alike. On the other hand, the iron fisted bandit image of Villa appealed to US business leaders with interests in Mexico because they viewed him as a strong leader in the image of Diaz, one who could control Mexico and allow their businesses to flourish. Villa’s reputation earned him nearly universal support, and in many ways eclipsed Carranza.²⁵

Villa’s support from the United States brought him scorn and jealousy from revolutionary leaders in Mexico City. After escaping from a brief imprisonment in 1913, Villa vowed revenge on the government. He raised his own army, known as the Division del Norte, to nearly eight thousand men and defeated all of the federal Troops in Chihuahua ending the campaign with his capture of Juarez on 15 November 1913. It was an operation that received immediate praise from US Army officers including Army Chief of Staff Brigadier General Hugh Scott who called it “a beautiful piece of strategy” and thought Villa may “yet develop into a ruler”²⁶

²⁴ Katz, *The Life and Times of Pancho Villa*, 1, 795-796.

²⁵ Ibid., 309-314.

²⁶ Eileen Welsome, *The General and the Jaguar: Pershing’s Hunt for Pancho Villa, a True Story of Revolution and Revenge* (New York: Little, Brown, 2006), 35-37.

The United States did not take an active role in the Mexican Revolution in its early years from 1910 through 1913. Elected as president in November 1912, Woodrow Wilson's administration wanted to develop a friendship with the nations in Central and South America. He also wanted to spread liberal values of democracy such as the rights of man and good governance a nation's citizenry. In his inauguration speech, Wilson asserted, "Mexico will never become a peaceful and law-abiding nation until she has been permitted to achieve a permanent and basic settlement of her troubles without outside interference." To this end, President Wilson adopted a policy known as "watchful waiting." This meant the US took a neutral stance between the Mexican government and the rebel groups. The only action was an arms embargo on all forces within Mexico in an attempt to quell the violence. Wilson's ability to maintain "watchful waiting" would end barely a year into his administration.²⁷

In April 1914, a force of Carranza's rebels began an offensive to capture Tampico from the government forces. Local American business owners looked to Rear Admiral Henry Mayo, commander of US ships off the coast of Tampico, for protection. A confrontation occurred when Mexican port authorities arrested several US sailors on a resupply mission into Tampico. Mexican officials released the sailors within an hour but not until "parading" them through the city. Mayo, angered over the perceived affront to US honor, demanded an apology and twenty-one-gun salute in deference to the US forces. City officials refused without approval from Mexico City and the incident escalated into a national affair.²⁸

Wilson and the American public would not tolerate the insult to US honor. Wilson chose Veracruz, Mexico's oldest city and a vital port on the east coast, as a potential target for

²⁷ Robert E. Quirk, *An Affair of Honor: Woodrow Wilson and the Occupation of Veracruz* (New York: W.W. Norton, 1967), v; Mason, *The Great Pursuit*, 33; Eisenhower, *Intervention!*, 37.

²⁸ Quirk, *An Affair of Honor*, 10-13; Meyer, Sherman, and Deeds, *The Course of Mexican History*, 394-395.

retaliation. Its occupation would have a far greater impact on the Mexican government than Tampico. In a 20 April address to a joint session of Congress, Wilson declared military action in response to Tampico essential to ensure that the “offenses” do not grow worse and “lead directly and inevitably to armed conflict.” His appeals to US honor drew loud applause from the assembled Congress. That night, the opportunity to seize Veracruz presented itself when Wilson learned that a German cargo ship, SS Ypiranga, carrying arms bound for the Mexican Army was nearing the port. He ordered the immediate occupation of the Veracruz customs house to prevent their delivery and the US occupation of Veracruz began.²⁹

When marines took the city, hundreds of noncombatants died in the fighting, resulting in a Mexican public outcry from all sides of the revolution. Carranza and his supporters, though happy to see that the weapons did not go to the government, disapproved of the blatant violation of Mexican sovereignty. The occupation drove Carranza to contact Wilson directly to condemn “the invasion of our territory and the permanency of your forces in the Port of Veracruz” as a “violation of the rights that constitute our existence as a free and independent sovereignty’.” Carranza even threatened a war that both he and Wilson hoped to avoid.³⁰

Aided in part by the US occupation of Veracruz, Carranza occupied Mexico City and declared himself “First Chief” of Mexico in July 1914. The revolution continued as several revolutionary leaders, Villa included, turned on Carranza and continued the fighting. In April 1915, Villa’s success came to a halt. In a series of charges reminiscent of the fighting on the Western Front, Villa lost nearly ten thousand soldiers to Obregon’s barbed wire and machine guns. Alvaro Obregon, Carranza’s general opposing Villa, did not come from a military

²⁹ Quirk, *An Affair of Honor*, 40, 75-77.

³⁰ Meyer, Sherman, and Deeds, *The Course of Mexican History*, 395; Vestunio Carranza quoted in Herbert Molloy Mason, *The Great Pursuit* (New York: Random House, 1970), 51.

background, but had studied the ongoing war in Europe. His ability to employ machine guns and entice Villa to attack led to the destruction of the Division del Norte in June 1915.³¹

The United States in Mexico

The United States policy during the Revolution, after the withdrawal from Veracruz, focused on border security, compensation for financial losses and arrangements for settlements of issues of mutual concern. With Carranza the apparent leader of Mexico after Villa's defeats in 1915, President Wilson officially recognized Carranza as the legitimate leader of Mexico on 19 October 1915. With the recognition came renewed access to US military arms, which Villa no longer received. Villa began to raise a new army in Chihuahua to renew his attack on Carranza. The new force of thirteen thousand men marched to Agua Prieta on the Arizona Mexico border. This battle again ended in defeat for Villa after failed frontal assaults against strong positions, manned by soldiers that had just moved via US railroads through New Mexico and Arizona. Villa, infuriated by the perceived betrayal on the part of the United States, declared that "from this date on his ammunition would only be used against the Americans and not one round would be fired against his fellow Mexicans."³²

In December 1915, after defeating Villa's Division del Norte for the final time, Carranza's Army occupied Chihuahua City. General Obregon offered amnesty along with ten dollars in gold to any Villa soldier or officer who surrendered except for Villa himself and four of his closest officials. In all forty Generals, 5,046 officers, and 11,128 soldiers accepted the pay from Obregon and surrendered. Unable to find jobs many of these former fighters could only look to the Mexican Army for work. With Villa still at large, most did not want to risk drawing the

³¹ Meyer, Sherman, and Deeds, *The Course of Mexican History*, 400-401; Quirk, *An Affair of Honor*, 158; Katz, *The Life and Times of Pancho Villa*, 341, 496.

³² Hurst, *Pancho Villa and Black Jack Pershing*, 1-3.

wrath of their former leader. This meant that in early 1916, Chihuahua contained many former Villa soldiers with little or no prospects for work, yet still maintaining a loyalty to Villa through either fear or love.³³

In 1915, while Villa fought General Obregon in Chihuahua and Carranza sought US recognition, a violent race war emerged in the US border states. The struggle rose from racial tensions between ethnic Mexicans living among a dominant, yet minority, white population. Extra judicial killings by the white population such as the lynching of men and boys accused of murder created social unrest in the Texas Mexican population. On 24 January 1915, local authorities in Texas discovered a document, known as the Plan de San Diego. The plan called for all Mexicans living in Texas to conduct an armed uprising against the anglo population in Texas on 20 February. While the plan of a state wide armed uprising against the anglo population never arose, it did briefly gain national attention.³⁴

The war in Europe and the upcoming presidential elections in the fall of 1916 were President Wilson's top concerns. Wilson's major campaign platform for the upcoming election was his success in keeping the United States out of the war and he did not want any of the actions in Mexico from either the occupation of Veracruz or border violence to jeopardize that stance. Secretary of State Robert Lansing recognized that "it comes down to this: possible relations with Germany must be our first consideration; and our intercourse with Mexico must be regulated accordingly." The United States could not take any action in Mexico without considering its impact on US neutrality. In the hope of finally stabilizing the chaos in its southern neighbor, President Wilson recognized the Carranza government and told the US public that Mexico should be left to figure out their internal affairs. His passive stance after the Veracruz intervention faced

³³ Katz, *The Life and Times of Pancho Villa*, 537-550.

³⁴ Arnoldo De Leon, "Introduction," in *War Along the Border: The Mexican Revolution and Tejano Communities*, ed. Arnoldo De Leon (College Station: Texas A&M University Press, 2012), 37-38.

a significant challenge in January 1916 when a group of Mexican bandits, under the direction of Pancho Villa stopped a train in Chihuahua carrying employees from a United States owned mining company. The bandits identified the eighteen US citizens on the train pulled them off, robbed and stripped them, and finally executed all but one who survived the first gunshot and avoided the “mercy shot” by feigning death. The murders quickly drew national attention and demand for action. President Wilson tempered the reaction by offering Carranza’s government an opportunity to bring the killers to justice. The Columbus raid only two months later ended Wilson’s ability to delay action. With the murder of the miners, the racial tensions from the Plan of San Diego and increasing potential of involvement in the European, the regional and international stage was set for a spark to ignite a war.³⁵

News of Villa’s surprise attack on Columbus spread outside of Columbus while the attack occurred. The telephone operator in Columbus managed to reach her counterpart in Deming, NM and described the attack occurring around her. An Associated Press correspondent, in town during the attack and after the raid, broke into the railroad telegraph office to send the news to his editors. These reporters ensured their scoop spread news of the attack around the United States. President Wilson, two thousand miles away in Washington, DC, learned of the raid only three hours after Villa’s force crossed the border back into Mexico. Secretary of State Lansing, immediately sent a note to his agents in Mexico City to confront Carranza and relay his expectations of full cooperation from the Mexican Government and to determine what knowledge he had of Villa and his intentions in the days leading up to the attack. The next day, 10 March, President Wilson called for a cabinet meeting to discuss retaliation options.³⁶

³⁵ Hurst, *Pancho Villa and Black Jack Pershing*, 19-21, 37; Haley P. Edward, *Revolution and Intervention: The Diplomacy of Taft and Wilson with Mexico, 1910-1917* (Cambridge, MA: MIT Press, 1970), 184.

³⁶ Mason, *The Great Pursuit*, 23-24.

President Carranza, in Mexico City, also learned about the Columbus raid on 9 March. His consul in El Paso and military commander in Sonora both telegraphed to warn him of the potential uproar in the United States and to inform him of their preparations to resist a potential US invasion. Carranza counseled both to use care to prevent a war with the United States. He understood the pressure that Wilson was under from political rivals to take a strong stance on foreign policy in light of the war in Europe as well as the coming fall 1916 elections. In his response to Secretary Lansing's inquiry, Carranza expressed that he was unhappy to hear about the "lamentable occurrence" of the Columbus raid and recalled the Apache raids from US reservations into Sonora and Chihuahua from 1880 to 1884. He reminded the secretary that the successful response to the Apache raids only came as a combined action between US and Mexican forces. Carranza pledged to "exterminate Villa and his band" and requested permission for his military to enter the United States as needed in pursuit. He also offered that the US military could reciprocally enter Mexico in the event of a future raid.³⁷

The Campaign

President Wilson called for a cabinet meeting on 10 March to discuss military options for a response to the raid. It was also the first day on the job for newly-appointed secretary of war Newton Baker. Secretary Baker was a lawyer by training and previously mayor of Cleveland. He had never held a position within the federal government. He faced his first challenge as secretary when the result of the meeting fell squarely on his shoulders and the White House issued a statement to the press. The statement called for "an adequate force [to] be sent at once in pursuit of Villa with the single object of capturing him and putting a stop to his forays. This can and will be done in entire friendly aid of the constituted authorities of Mexico and with scrupulous respect for the sovereignty of that republic." President Wilson and his cabinet set the policy goal for the

³⁷ Stout, *Border Conflict*, 40; Tompkins, *Chasing Villa*, 66-67.

expedition, which is a crucial element of the relationship between strategy and policy. However, in this instance, Wilson's staff released the statement prior to a dialogue with strategic leaders to understand what was possible. This resulted in an expectation from the US public that Villa was the target for Pershing's campaign. Immediately after the meeting as the press learned of its result, Secretary Baker walked to the War Department building to meet with Army Chief of Staff, Major General Hugh Scott and conduct the dialogue between strategy and policy.³⁸

Secretary Baker maintained Scott as Army Chief of Staff for his reputation for tact when advising inexperienced civilian leaders. Secretary Baker began his conversation with Scott with a simple statement, "I want you to start an expedition into Mexico to catch Villa." Scott, recognizing the larger implications of that order, questioned Baker's intentions to pursue Villa to other countries if he should escape Mexico, seeking Baker's true intentions. In the end, Baker recognized that his political goal for the expedition was to capture or destroy Villa's band. Their next topic was determining a leader for the expedition. The natural choice was the Southern Department Commander, Major General Frederick Funston. His troops would conduct the campaign, and he had recent experience in Mexico as the commander of US forces in the Veracruz occupation. Scott, however, advised against Funston's appointment due to his reputation as a "hot head." Fearing that Funston's aggressive nature would only increase the chance of war with Mexico, Scott suggested the younger Brigadier General John Pershing.³⁹

At fifty-five years of age in 1916, Pershing was one of the youngest generals in the army. In September 1906, then President Theodore Roosevelt promoted Pershing from captain directly to brigadier general, bypassing four ranks and 862 officers. An 1886 graduate of West Point, Pershing had fought on San Juan Hill with Roosevelt and earned a Silver Star. His experience

³⁸ Eisenhower, *Intervention!*, 230; Mason, *The Great Pursuit*, 69.

³⁹ Eisenhower, *Intervention!*, 230-235; Mason, *The Great Pursuit*, 69; Welsome, *The General and the Jaguar*, 162-163.

also included fighting Indians in the West and Moros in the Philippines. He had earned a reputation for bravery and as a strict disciplinarian, but most importantly for Scott in 1916, he was not a man to be provoked into rash action. These qualities attracted Scott to Pershing for command of the expedition.⁴⁰

Upon receipt of his appointment to command the expedition, Pershing immediately moved to Columbus, arriving only three days after the raid. His initial orders from Funston, as a result of the meeting between Baker and Scott, were to “proceed promptly across the border in pursuit of the Mexican band which attacked the town of Columbus, New Mexico.” The expedition would “be withdrawn to American territory as soon as the de facto [Carranza] government in Mexico is able to relieve them of this work.” The end state of the mission, whether executed by Mexican or US forces, was “Villa’s band or bands are known to be broken up.” The US political leadership chose to order the Expedition immediately into Mexico despite Carranza’s offer for *future* authorization to cross the border.⁴¹

Funston called for units throughout the southwest to move to Columbus, New Mexico to join the gathering force. The principal combat units that made up Pershing’s command were the Seventh, Tenth, Eleventh, and Thirteenth cavalry regiments. Other units included the Sixth and Sixteenth regiments of infantry, two batteries from the Sixth Field Artillery, a battalion of engineers, a hospital unit, and for the first aviation deployment in US Army history, the First Aero Squadron. Units and equipment began to arrive via rail and car. When Pershing arrived, he found nothing but chaos and disorder without a central figure to control the mobilization and he set into organizing the force for the campaign.⁴²

⁴⁰ Mason, *The Great Pursuit*, 75; Richard O’Conner, *Black Jack Pershing* (Garden City, NY: Doubleday, 1961), 14, 50-51, 85-86.

⁴¹ Pershing, “Report of the Punitive Expedition,” 3.

⁴² *Ibid.*, 5; John J. Pershing, *My Life Before the World War, 1860-1917*, ed. John T. Greenwood (Lexington: University of Kentucky Press, 2013), 339.

The soldiers that assembled at Columbus were excited to begin the mission. This was the first combat operation for the Army since the Philippine Insurrection, fifteen years earlier. While many of the soldiers were inexperienced, Pershing's force contained an experienced corps of senior leaders. Two-thirds of the officers had served in the Philippines and several served in the frontier wars before that. These officers knew how to chase and fight a small band of raiders that resembled the guerillas they had fought on Luzon. They had risen through the ranks of an army with a "constabulary heritage," practiced in operating on a spectrum between military and policing missions. They had conducted military missions fighting the Spanish in 1898 and experienced policing in the Philippines. They could perform either role again in Mexico and relied on their own judgement and that of their commander to determine which would be appropriate.⁴³

While the expeditionary force continued to consolidate for the beginning of the operation, Pershing turned his attention to developing an understanding of the environment he was about to enter and to publish his first orders. Pershing initially did not have a good understanding of Villa's location. He could not even confirm if Villa remained in Chihuahua, though reports made that the most likely location. Pershing decided to rely on surprise and speed to catch him. Pershing's approach employed tactics familiar to any of the veterans of the frontier wars. He planned to use "flying columns" of cavalry to gain intelligence and then allow his commanders freedom to react in order to catch or destroy Villa's band.⁴⁴

As he planned, Pershing considered the political and civilian environment within Chihuahua. He was well aware of the contentious history between the US and Mexico. From the US invasion in 1846 to the occupation of Veracruz only two years earlier and the near constant violence along the border, Pershing did not expect a savior's greeting from the Mexican civilians

⁴³ Hurst, *Pancho Villa and Black Jack Pershing*, x; Eisenhower, *Intervention!*, 237; Showalter, "The U.S. Cavalry," 8.

⁴⁴ *Ibid.*, 239-241.

or their military. In his memoirs, Pershing remembered the challenges the Chihuahua population posed to his efforts to locate Villa and his band: “although Villa was a public enemy, we were foreigners, there by agreement it is true, yet we were invaders and Villa was their countryman.” Other officers within the expedition remembered that not only did the Mexican Army not cooperate with Pershing’s force, “under the guise of cooperation, [the Army] furnished deliberately false information, made with intent to deceive and delay.” The same officer also noted that the entire time the army operated in Chihuahua they were “surrounded by enemies who were posing as friends.” The civilian population and the military officers that Pershing and his subordinate leaders operated among ranged from neutral to openly hostile. Pershing determined that he could not rely on human intelligence from Mexican citizens to locate Villa.⁴⁵

Funston continued to refine his guidance for Pershing that developed a picture for him of the nature of the diplomatic relationship between the US and Mexico. The instructions included an imperative to employ “the greatest caution” not to directly engage in combat with the Mexican Army. He was also to “endeavor to convince all Mexicans that the only purpose of this expedition is to assist in apprehending and capturing Villa and his bandits.” A telegram on 13 March informed Pershing that President Wilson held the “pursuit and dispersion of the band or bands that attacked Columbus, NM of the utmost importance. That no color of any other possibility or intention be given.” The telegram relayed the president’s strong desire that “neither in size or otherwise should the expedition afford the slightest ground of suspicion of any other larger object.” What Pershing did not understand, because the Wilson government either misunderstood or willfully ignored the fact that Carranza’s offer was for future raids, was that the Mexican government would view any incursion after the Columbus raid as a violation of Mexican sovereignty. Thus, Pershing began his campaign into Mexico under a false expectation from the war department that the Mexican Army would cooperate. He also understood that he needed to

⁴⁵ Pershing, *My Life Before the World War*, 339; Tompkins, *Chasing Villa*, 69.

avoid a confrontation and ensure his command did not allow any incidents with the Mexican Army to escalate, thereby creating “suspicion of a larger object” than simply breaking up Villa’s band.⁴⁶

The course of the experience of Pershing’s expedition into Mexico to break up the bands of Pancho Villa can be divided into two phases. Rapid maneuver and intelligence gathering characterized the first phase. This shorter portion of the US experience in Mexico, only three months long, resembled the campaigns from the frontier wars with a slow moving supply train secured by infantry, supporting fast moving cavalry formations attempting to surround and engage their target. The second phase, beginning in July 1916, saw Pershing’s expedition cease the long sweeping movements across the Mexican desert and instead focused on short range patrolling after Villa’s Lieutenants and, eventually, the Mexican Army itself. The operation as a whole bears resemblance to the limited contingency operations described in modern joint doctrine and is an example of an operational leader managing the rate of escalation of violence.

⁴⁶ Pershing, “Report of the Punitive Expedition,” 5; Tompkins, *Chasing Villa*, 71.

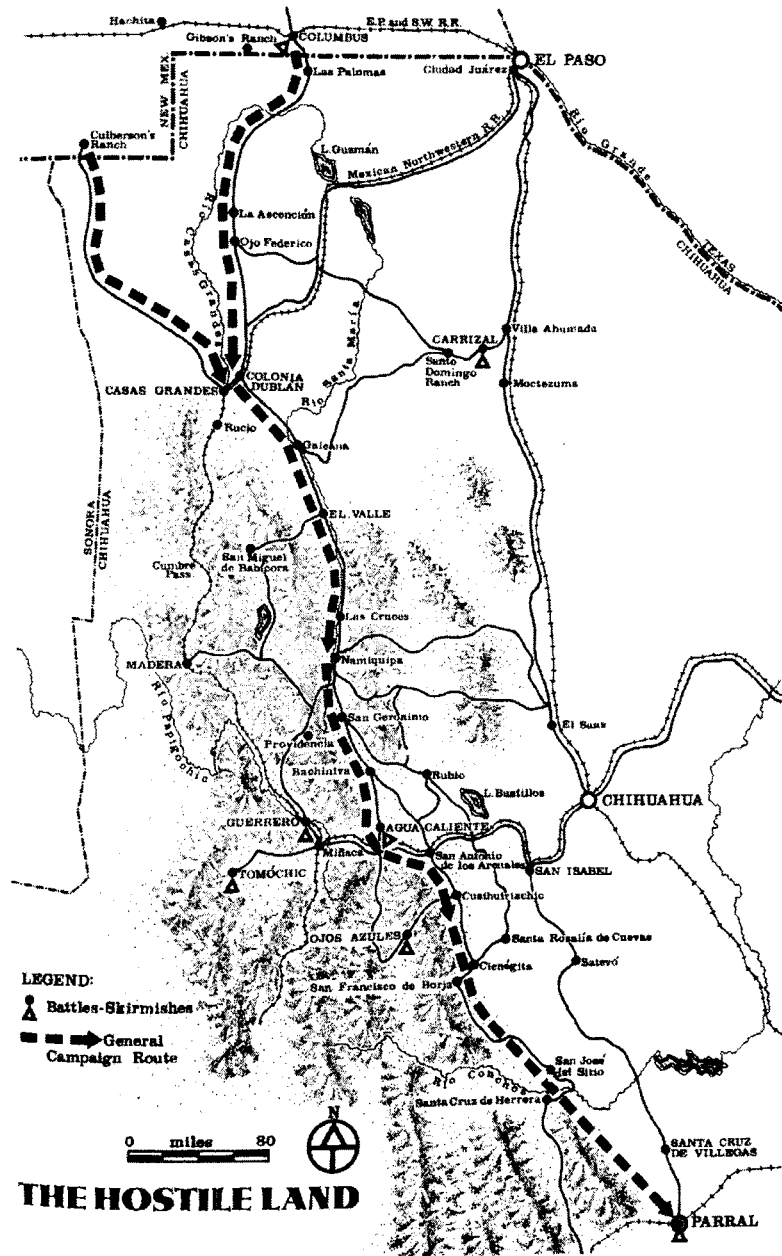


Figure 1. Operational Area in Chihuahua, Mexico

Source: Herbert Molloy Mason, *The Great Pursuit* (New York: Random House, 1970), 87.

Pershing's first order to his command, General Order No. 1, reflected his understanding of the environment. The order, published on 14 March, one day before the expedition crossed into Mexico, consisted of a list of assigned units, a list of key staff officer assignments, and most

importantly instructions for conduct within Chihuahua. Pershing relayed the telegrams from Washington in the order conveying the imperative to avoid confrontation with the Mexican Army and “exercise great discretion.” The order also included a directive that the soldiers of the command would “make every endeavor to convince all Mexicans that the only purpose of this expedition is to assist in apprehending and capturing Villa and his bandits.” Pershing required that “citizens as well as soldiers of the [Mexican] government will be treated with every consideration.” Pershing’s order to his force prior to beginning the expedition reflected a clear understanding of the environment he was entering and the nature of the political relationship between the US and Mexico. His force was not to be an occupier or invader of a hostile land and he did not want his troops to conduct themselves as one. Instead, he saw his primary mission as capturing Villa and breaking up his band while not aggravating the local Mexican population and military and risking an escalation of the conflict beyond its original purpose.⁴⁷

On 14 March, the day General Order No. 1 went out to his force, Pershing received his first evidence that the Mexican Army would not be as cooperative as his government believed. The Mexican Army commander in Palomas, the first town in Mexico six miles south of Columbus, declared that he would not allow any US invaders into sovereign Mexican territory. Wary of violating the guidance from Washington prior to even leaving the United States, Pershing delayed the start of the expedition in order to seek guidance from Funston on the issue. Funston believed that Pershing could avoid escalation with the Mexican Army by capturing Villa quickly and returning to the United States. He ordered Pershing to proceed in order to deny Villa more time to escape. As his column from Columbus began south, Pershing planned to pay off the Palomas commander in order to avoid a confrontation, however when the US troopers arrived in the town they found it abandoned by the Mexican Army. Pershing’s actions in these opening days of the campaign served as an example for the leaders in the expedition of his expectations for

⁴⁷ Pershing, “Report of the Punitive Expedition,” 5-6.

interacting with potentially confrontational Mexican force. Pershing could have ordered his regiments to isolate Palomas and prepare for an attack upon learning of the garrison's hostile intentions. Instead, he sought further guidance and approached the town in a manner that allowed the garrison to escape and avoid an early escalation of the conflict.⁴⁸

The expedition began on 15 March 1916 when two columns from Columbus, New Mexico and Culberson's Ranch to the west crossed into Mexico. Their first objective was to establish a forward base for logistics and communication 120 miles into Mexico at Casas Grandes, Chihuahua. Pershing selected this town for his base because it was the town furthest south into Mexico that he considered friendly. Pershing moved with the faster western column and arrived in Casas Grandes by evening 17 March. This column consisted of only the seventh and tenth cavalry regiments. The slower moving infantry and supply wagons moved from Columbus. Upon arrival to Casas Grandes, Pershing had his staff immediately began to establish a headquarters.⁴⁹

During Pershing's headquarters' first night in Casas Grandes, locals reported to Pershing that Villa was near San Miguel Babicora in the mountains to the south. He immediately ordered the seventh and tenth cavalry to prepare to move in two parallel columns in order to restrict Villa's escape options. The Tenth Cavalry traveled via rail in order to move to west and south of Babicora quickly and give their mounts an opportunity to rest. The Seventh Cavalry under Colonel George Dodd moved south further to the east in order to approach Babicora from multiple directions. In an example of today's mission command, Pershing realized he would be unable to coordinate the movement from Casas Grandes; therefore, he placed Dodd in command of the Seventh and Tenth cavalry's attempt to catch Villa in Babicora. Distance, terrain, and

⁴⁸ Frank E. Vandiver, *Black Jack: The Life and Times of John J. Pershing*, vol. 2 (College Station: Texas A&M University Press, 1977), 610; Thomas and Allen, *Mexican Punitive Expedition Under Brigadier General John J. Pershing*, 2-15.

⁴⁹ Mason, *The Great Pursuit*, 85; Hurst, *Pancho Villa and Black Jack Pershing*, 45.

troubles with the railroad prevented either column from arriving in Babicora until 23 March. Scouts from the tenth were the first to arrive and learned that Villa was not there, reports disputed if he had ever been there at all. Dodd, still further west, encountered a Mexican Army officer near the town of El Valle. He informed Dodd that Villa was hiding in Namiquipa further south. Dodd immediately turned his column in that direction. The next day he heard reports that Villa left Namiquipa several days prior. No longer sure which reports to believe, Dodd decided to turn his column west toward the mountains and the tenth cavalry.⁵⁰

While laboring through the mountains, Dodd learned from a local villager on 28 March that Villa was in Guerrero, thirty-six miles south. This report was in fact true. Only that morning Villa had attacked the Mexican garrison in the town and been wounded during the fighting. Dodd sent a message via airplane to inform Pershing of his decision to follow the lead and, hoped to quickly navigate the maze of mountains and quickly catch Villa. The seventh's trek through the mountains during the day and night of 28 March did not move as fast as Dodd hoped. The guide employed by the troopers either did not know the route or intentionally delayed the movement. In either case, Dodd placed his troops around the town in the morning hours of 29 March and initiated the attack at dawn. The delay allowed the injured Villa to escape south before the seventh cavalry could establish its cordon around the town. Dodd, however, gained a significant victory over Villa's men, killing or wounding nearly one hundred of his followers. Congress greeted news of the fight with cheers and President Wilson nominated Dodd for a Silver Star.⁵¹

News of the fight at Guerrero reached Pershing in his forward headquarters, a Dodge car. No longer able to stand the isolation from his subordinate commanders in Casas Grandes,

⁵⁰ Mason, *The Great Pursuit*, 92-93; Pershing, *My Life Before the World War*, 342; Eisenhower, *Intervention!*, 245-247; Welsome, *The General and the Jaguar*, 187; Army Doctrine Reference Publication (ADRP) 6-0, *Mission Command* (Washington, DC: Government Printing Office, 2012), 2-1.

⁵¹ Mason, *The Great Pursuit*, 96-98.

Pershing decided to move a small headquarters element forward to improve the speed of his communication with the flying columns. The headquarters group consisted of his aide, Lieutenant George Patton, an intelligence officer, a cook, and drivers for security. A group of reporters also followed the mounted column. The headquarters traveled lightly. Pershing only brought a shaving kit and toothbrush. To fight the cold desert nights, Patton had the unenviable task of sharing a blanket with his commander to generate warmth.⁵²

Pershing's decision to move forward offered him better opportunities to meet with his subordinate leaders, but it also placed his headquarters at greater risk. On 29 March, the same day he learned of Dodd's success, Mexican General Luis Herrera and two hundred of his Mexican cavalry surrounded and approached Pershing's headquarters. The two generals met, each of them attempting to gain information from the other about unit strengths, dispositions, and intentions. Neither leader was successful in this endeavor, but Pershing received the clear message from Herrera, he did not want the US Army to continue its movement south into Mexico.⁵³

Other officer's within Pershing's command had encounters with Mexican leaders. On 8 April, Major Robert Howze with his detachment of the eleventh cavalry met nearly three hundred Mexican cavalry. The initial contact occurred when the Mexican cavalry, seeing only a small portion of Howze's command, initiated a mounted charge. Howze ran in front of his troopers, waving his arms in an attempt to stop the charge, instead of bring up additional troops and engaging the attackers. The Mexican's finally ended their charge and rode off when they closed to within fifty yards of Howze and his Troops.⁵⁴

The road to the confrontation at Parral began on 1 April when Major Frank Tompkins of the thirteenth cavalry sat next to a campfire and spoke with Pershing. Tompkins persuaded his

⁵² O'Conner, *Black Jack Pershing*, 624-625.

⁵³ Mason, *The Great Pursuit*, 123-124.

⁵⁴ Pershing, "Report of the Punitive Expedition," 19.

commander to allow him to lead a small force of just over one hundred men toward Parral. He based his request on his assessment that Villa would use Parral as a location to rest and recover from his wounds. Tompkins wanted to use a small force because it could move faster and evade detection. Pershing, accepted risk in exchange for speed and agreed to the operation. However, Pershing sought to mitigate that risk. He ordered the tenth and eleventh cavalry to support his movement south and to remain on Tompkins' flanks and only one to two days ride away. A third supporting formation from the eleventh Cavalry would remain three or four days away. This met Tompkins' desire and Pershing's intent for a rapid moving column that could avoid Mexican patrols and catch Villa. Importantly it included sufficient support from larger formations that could prevent a disastrous encounter with either Villa or Mexican forces that could alter the political landscape.⁵⁵

After his conversation with Pershing, Tompkins immediately began his movement, confident in the security the other cavalry regiments provided him. On 10 April, Tompkins and his troopers stopped in a town north of Parral to purchase supplies and rest their mounts. While there, a Mexican Officer approached Tompkins and offered Parral as a better resupply location. The next day Tompkins continued the movement south and stopped that night at a ranch, Santa Cruz de Villages, eighteen miles north of Parral. Early the next morning, Tompkins and his command moved south to enter Parral and arrived by noon. Initially welcomed by the Mexican General in the town, a hostile crowd formed and began chanting "Viva Villa" and "Viva Mexico." According to Tompkins reports, General Ismael Lozano, Mexican commander in Parral, and some of his officers attempted to disperse the crowd when gunshots rang out. Tompkins gathered his force and began to withdraw from the town to avoid a violent confrontation. As the Troopers moved north, they noticed a mounted force of Mexican cavalry

⁵⁵ Mason, *The Great Pursuit*, 128; Robert Bruce Johnson, "The Punitive Expedition: A Military, Diplomatic, and Political History of Pershing's Chase after Pancho Villa, 196-1917" (PhD diss., University of Southern California, 1964), 375.

attempting to cut off their retreat. The Mexicans began to engage Tompkins and his troopers with rifle fire. This initiated an eighteen-mile fighting withdrawal by Tompkins back to the ranch. He estimated nearly three hundred Mexican cavalry pursued him. During the retreat, Tompkins sent runners to request support from the supporting cavalry regiments. Having reached the ranch, Tompkins received a threatening message from Lozano ordering to withdraw north or face further attack. Tompkins, refusing to leave the compound, chose to wait for assistance to arrive. By sunset that night, before Lozano could organize an attack on Tompkins, the Tenth Cavalry arrived and ended any further threat from the Mexican Army.⁵⁶

Reports of the fighting at Parral reached Washington, Mexico City, Pershing, and El Paso shortly after it occurred and it set off a flurry of diplomatic activity and discussion on the future of the campaign. Pershing saw the engagement as a turning point in the campaign. He believed that his Troopers could not continue to avoid contact with the Mexican Army. He suggested to Funston, whom passed it on to Scott and Secretary Baker, that in order to capture Villa it was “absolutely necessary for us to assume complete possession for the time being of country through which we must operate and establish control of the railroads as a means of supplying forces required.” Funston’s reply directed Pershing to seek a defensive posture in order to avoid escalation and allow ongoing diplomatic negotiations to carry out. Funston’s orders reflected the growing reluctance in Washington take any action that could escalate the conflict.⁵⁷

The diplomatic messages between Washington and Mexico City did not carry a bellicose tone as neither nation wanted to see war erupt. However, Wilson wanted Villa stopped, and Carranza wanted Pershing out. Secretary Lansing sought to avert the impasse by suggesting a conference between top military officials from each nation. Generals Scott and O’Conner met in

⁵⁶ Hurst, *Pancho Villa and Black Jack Pershing*, 76-79; Johnson, “The Punitive Expedition,” 406-409.

⁵⁷ O’Conner, *Black Jack Pershing*, 633-636.

Juarez on 30 April. The two generals did not have any more success than the diplomats did in finding an agreeable solution to the conflict. Events outside of Juarez increased the tension of the negotiations when one hundred Mexicans raided two villages in Big Bend Texas, killing three soldiers and one child. News of the raid combined with Mexican demands that Pershing leave Mexico immediately made Scott grow concerned that the Mexican Army would soon attack Pershing's force in Chihuahua. He wanted to continue the negotiations to allow time for Pershing to concentrate his force and for the National Guard to respond to Secretary Baker's mobilization order for one hundred and fifty thousand soldiers on the border to secure US villages from further raids and as a deterrent against an attack against Pershing.⁵⁸

The fight at Parral and Funston's orders to Pershing to assume a defensive posture marked a change in focus for the expedition. Pershing could no longer use flying columns to find Villa. Washington and Funston made it clear that their primary goal now was to prevent a war with Mexico. On 29 April, Pershing published General Order No. 28, which consolidated the headquarters and supply for the expedition in Casas Grandes and divided the occupied territory into zones. The cavalry regiments would now search for Villistas within their assigned zones and secure the line of supply to the US. The efforts were somewhat successful as the regiments were able to kill or capture several of Villa's Lieutenants in Chihuahua. Pershing's greatest concern during this phase was an attack from the Mexican Army against his supply line. Pershing met with General Gabriel Gavira, the commander of Mexican troops in Juarez, a position that posed the greatest threat to Pershing's supply route. Gavira agreed to not station any soldiers along the overland route and agreed to limit soldiers along the Mexican Northwestern Railroad. Pershing also established an open telegraph line between his headquarters and the Mexican leadership in Chihuahua City. In mid-June, after the Scott-Obergon conference failed to create a lasting resolution, threats from Mexican Army leaders increased. A message from General Trevino,

⁵⁸ Clendenen, *The United States and Pancho Villa*, 270-273; Mason, *The Great Pursuit*, 169-181.

Mexican Army commander in Chihuahua at the time, warned Pershing that Mexican forces would attack any movement from the US Army other than north. Pershing refused to accept orders from a Mexican officer, but he reiterated to his leaders the increased threat from the Mexican Army and ordered his regiments “to make every effort to avoid contact.”⁵⁹

Two days after receiving the threat from Trevino, Pershing’s intelligence section received a report of ten thousand Mexican soldiers gathered to the east near Villa Ahumada. This placed a significant force in a position that threatened the US supply line to Columbus. In order to confirm the reports, Pershing sent Captain John Boyd and two troops of the tenth cavalry to conduct a reconnaissance west toward Villa Ahumada to find the Mexican force. Pershing, aware of the danger to Boyd’s force in light of Trevino’s threat met with Boyd prior to his departure to reiterate the importance of avoiding Mexican forces. Pershing’s staff even provided a location where Boyd could likely achieve his reconnaissance objective without actually contacting the Mexican Army. Despite these precautions, Boyd engaged with a Mexican force outside the town of Carrizal on 21 June when the Mexican commander there refused to allow the US troopers to pass. The fight resulted in twelve US killed, including Boyd, along with ten wounded and twenty-four taken prisoner. Tensions again flared between the two nations, and again the governments sought to avoid a larger conflict. Carranza ordered the prisoners released and Washington ordered Pershing to cease all movements. The search for Villa and his band effectively ended after the fight at Carrizal.⁶⁰

With the search for Villa halted and no orders for withdrawal to the United States, Pershing and his force found new means to occupy their time. The primary value for the force came in the training opportunity the months in Mexico provided. Pershing’s force conducted

⁵⁹ Pershing, “Report of the Punitive Expedition,” 24-29; Mason, *The Great Pursuit*, 199-200; Clendenen, *The United States and Pancho Villa*, 277.

⁶⁰ Mason, *The Great Pursuit*, 206-208; Pershing, *My Life Before the World War*, 358; Clendenen, *The United States and Pancho Villa*, 278-281.

exercises for all echelons of the force. Hunting and sports were the favorite off duty activities. In January 1917, Pershing received orders from Funston to prepare to withdraw to Columbus and on 5 February, the entire force crossed the border ending the Punitive Expedition.⁶¹

Analysis

Since the completion of the maneuver portion of Pershing's campaign in June 1916, historians and army officers have examined the campaign to find value for study. Some took the myopic view of the campaign as yet another example of the importance of horse cavalry for the army. Others used the history of the campaign to inform congressional decision making prior to committing the army to a limited operation. Aspects of the campaign with value that have not been examined are Pershing's operational leadership and the interaction between political and military ends throughout the course of the crisis. A limited contingency operation has a rapid initial response, is scoped in size, has political aspects, and requires economy of force. Pershing and his staff could not significantly influence the initial response or the forces allocated, as they commanded the force that constituted that response. Pershing was able to influence the outcome of the expedition as a limited contingency operation in the realm of its scope and political aspects. Herein lies the value for study of the 1916 Punitive Expedition.

While Pershing and his staff did not have a direct effect on the initial response or the economy of force aspects of the campaign in Mexico, it is important to consider them for their influence on the political aspects and the scope of the mission. Wilson, in his initial response to the Columbus raid, wanted to take action to secure American citizens and prevent Villa or his band from attacking the United States again. Wilson turned to Scott and the War College division for a recommendation of military action. They responded that any incursion by the army into Mexico would result in total war and therefore only the full mobilization by the military was

⁶¹ Hurst, *Pancho Villa and Black Jack Pershing*, 112-113, 118-119; Patton, "Cavalry Work of the Punitive Expedition," 427-429.

logical. Wilson refused to allow the military to drive his political goals and ordered Funston to prepare the force to enter Mexico with the limited objective of breaking up Villa's band. Wilson's initial response to Villa's raid sought to maintain the scope of the conflict to the punitive expedition. Even after the raid in Big Bend led to a mobilization of the National Guard, Wilson maintained the scope of the conflict by restricting the guard force to the United States.⁶²

Pershing's ability to support Wilson's political aims hinged on his understanding of the political aspects of the campaign and a placement of those aims as the primary concern for his headquarters and subordinate leaders. Orders from Pershing's headquarters and his interactions with leaders, subordinate and superior, demonstrate his appreciation for the policy goals of the expedition. General order no. 1 included excerpts of orders from Washington as well as guidance from Pershing. It specifically stated, "the greatest caution will be exercised after crossing the border that fire is not opened on troops pertaining to the [Mexican] government." Pershing added, "Citizens as well as soldiers of the [Mexican] government will be treated with every consideration." His interaction with subordinates reflected the same sentiments as the orders when he personally instructed Boyd before his Carrizal reconnaissance "to avoid a fight" or when he instructed Patton to not gather supplies from nearby towns because he did not want to instigate a confrontation with the Mexican Army. Pershing understood the importance of avoiding a confrontation with Mexican forces and strove to ensure his subordinates understood this also.⁶³

Pershing's control of the escalation of violence during the campaign allowed him to the tactical actions in Mexico did not force President Wilson to take actions against his political goals. Wilson was aware of the fights at Parral and Carrizal, but in both cases, Wilson maintained control of the political goal because Pershing did not enlarge the conflict. Pershing developed

⁶² Runkle, *Wanted Dead or Alive*, 85; Frederick Sill Calhoun, "The Wilsonian Way of War: American Armed Power from Veracruz to Vladivostok" (PhD diss., University of Chicago, 1983), 90; Tompkins, *Chasing Villa*, 70.

⁶³ Pershing, "Report of the Punitive Expedition," 5, 25; Mason, *The Great Pursuit*, 206; Martin Blumenson, *The Patton Papers*, vol.1, 1885-1940 (Boston: Houghton Mifflin, 1972), 206.

control of escalation in Chihuahua by maintaining communication with local Mexican Army leaders, creating a climate among the command that encouraged restraint when confronted by Mexican forces, and employing his force in such a way that prevented their isolation.

Pershing and his officers maintained frequent and readily available communication with Mexican leaders. Early in the campaign, Pershing hoped the communication would help his staff gain information regarding Villa's location. As the expedition crossed into Mexico, every unit carried a copy of Obregon's declaration to the Mexican people explaining the agreement between the two nations. He quickly learned the document was useless and on 21 March telegraphed Funston, "if this campaign should prove successful it will be without any real assistance of any natives this side of the line." Despite the apparent lack of cooperation from the Mexican authorities, Pershing continued to seek opportunities to maintain contact. That effort prevented a confrontation on the first day at Palomas, defused tension after the Parral fight, and allowed Pershing to negotiate agreements with Mexican commanders that maintained security of his supply line to the United States.⁶⁴

Pershing further managed the escalation of the conflict in the tactical employment of his cavalry regiments. His approach to capturing Villa in the opening weeks of the campaign was to employ "flying columns" to locate Villa and capture him, as Dodd and the Seventh Cavalry attempted at Guerrero. The inherent risk in this technique was isolation of a column from the rest of the command. Pershing recognized the threat, but did not fear a Mexican force destroying a US force. The Parral fight is evidence of the value of deploying columns in support of each other. Tompkins' force of less than a hundred men was a tempting target for the three hundred Mexican soldiers in Parral. He only ceased to be a target when reinforced by two more cavalry regiments. Considering the political uproar that occurred after the Parral fight, it is not difficult to imagine what it might have been like if the Mexican Army had persisted in its attack of Tompkins force.

⁶⁴ Pershing, "Report of the Punitive Expedition," 10; Pershing, *My Life Before the World War*, 338.

A continued attack from the Mexican Army had the potential to spur US Congressional leaders to demand of an occupation of Mexico and declare war.

A final aspect of Pershing's campaign that prevented the escalation of the conflict was the organizational climate among the officers in Mexico that valued thoughtful and deliberate action over reckless violence. Retired US Army Lieutenant General Walter Ulmer wrote in 1987 that "climate is more easily felt than defined" and that "climate represents the collective impact of policies, expectations, priorities, operating values, management techniques, and leadership styles on motivation to get the job done right." Throughout the campaign, less Captain Boyd at Carrizal, Pershing's officers demonstrated restraint during confrontations with the Mexican Army, often after provocative actions such as Parral and the Mexican cavalry charge on Major Howze. The writings of the officers during and after the campaign further reflect the organizational climate. Tompkins in his memoir lauded the restraint shown by his Troopers during the campaign. *Cavalry Journal*, writing based on a collection of notes from the deployed force, highlighted "the patience and forbearance of the American officers and soldiers in the face of most provoking and intimidating hostilities." Finally, before the battle at Carrizal, a civilian observer remembered hearing Boyd argue with another officer in the command over the coming next day's action. The other officer disputed Boyd's determination to go through the town despite the presence of a Mexican force as being in direct contradiction to Pershing's orders. This officer understood Pershing's intent and Boyd might have avoided a fight had he heeded Pershing's advice.⁶⁵

Pershing's most significant action that maintained the scope and political goals of the operation was his recognition of a decision point for Wilson after the fight at Parral. Pershing, after the battle, went to his leaders to discuss a new operational approach. The action at Parral established that he could not capture Villa and avoid conflict with the Mexican Army. Pershing's

⁶⁵ Walter F. Ulmer, "The Army's New Senior Leadership Doctrine," *Parameters* 17, no. 4 (December 1987): 10-11; Ezra B. Fuller, "The Attack on Our Cavalry at Parral," *Journal of the U.S. Cavalry* 28, no. 116 (October 1917): 253.

orders were to “break up” Villa’s band, but based on the initial order from President Wilson released to the press prior to a discussion with Scott, Pershing considered Villa himself as the target that, if captured, would achieve the goal. The new strategy is revealing. Strachan includes identification of an enemy as a major step of coherent strategy. After the fight at Parral, Villa and his band remained an enemy, but what the new strategy confirmed was that the Mexican government was not.⁶⁶

Conclusion

Many historians call the ultimate success or failure of Pershing’s expedition into question because it did not end in the capture of Villa. An analysis of the campaign’s outcome from multiple angles provides the best assessment. First is the military end state that Pershing received, “that Villa’s band or bands are known to be broken up.” The second are the political goals, which initially aligned with the military goal but after the fight at Parral shifted to avoiding a war with Mexico above all else. General Order number one listed “to assist in apprehending and capturing Villa and his bandits” as the sole mission of the expedition. This order, when read in context with the military end state provided to Pershing reflects a specific target for the subordinate commands, not a definitive end state for the mission. Pershing, by focusing the search efforts of his regiments on Villa, created unity of effort that would have been difficult if each subordinate commander were to have decided which of Villa’s bands to pursue. Pershing’s desire to coordinate effort among his command is evident in Orders no. 28 as well. When Villa no longer provided a focal point because of his movement out of Chihuahua, Pershing ordered his regiments to “hunt down isolated bands” within their areas of operations. The effect of both of Pershing’s efforts was that he kept Villa on the run, while killing many of his men and his top lieutenants. Pershing reported that his command had killed 273 of the Columbus raiders by the

⁶⁶ Strachan, *The Direction of War*, 12.

end of the expedition. Pershing's expedition took a significant physical toll on Villa and his men and it did have the effect of Villa never again leading a raid into the United States. Pershing's expedition did succeed in its military objective, though the greater success is in the political context of the operation.⁶⁷

James Hurst placed much of the perceived failure of Pershing's campaign at the feet of President Wilson and his policy of intervention in Mexico, but desire to employ limited military force. The control Wilson insisted on maintaining over Pershing meant Pershing could not pursue Villa and therefore Villa gained back power in Chihuahua while the expedition remained in Casas Grandes. Hurst's defense of Pershing insinuates Wilson was responsible, not Pershing, in any perception of failure. Hurst's article misses the key point of learning from Pershing's actions during the campaign. Military historian, Antulio Echevarria wrote, "the American way of war was, and still is, thoroughly political." In all of America's wars, to include Iraq and Afghanistan today, political, not military goals drove the decision to employ force and then the amount of force used was "rarely overwhelming or decisive." Despite the War College division's claims that overwhelming military force was the only logical intervention strategy, Pershing's mission and its constraints were not unusual or wrong. They were his orders and the political end state, and in the end, all that matters in measuring the success of the operation.⁶⁸

Pershing's actions and orders that placed the political aim as the primary concern of the expedition are worthy of consideration for inclusion in any limited contingency operation. Pershing realized very early in the campaign that avoiding any violent confrontation with the Mexican Army was impossible. He made his expectations for conduct very clear to his command

⁶⁷ James W. Hurst, "The Pershing Punitive Expedition of 1916-17: Mission Misunderstood," *Southern New Mexico Historical Review* 11 (February 2004): 9-18; Pershing, "Report of the Punitive Expedition," 24-25.

⁶⁸ Hurst, "The Pershing Punitive Expedition of 1916-17," 12; Antulio J. Echevarria II, *Reconsidering the American Way of War: US Military Practice from the Revolution to Afghanistan* (Washington, DC: Georgetown University Press, 2014), 1-2.

and the professional and experienced leaders understood his intent. The climate within the command valued avoiding hostile contact with the Mexican Army and restraint when it occurred. Pershing's operational approach, both during the opening weeks of the campaign and after reframing at Parral, sought to prevent his subordinate elements from being isolated and presenting an inviting target to the Mexican Army. This allowed the expedition's commanders to take a passive stance and seek to deescalate a violent confrontation. Finally, Pershing's effort to open communication with Mexican leaders was vital to minimizing ambiguity in regards to each side's intentions and limiting opportunities for conflict. Use of the US military in limited operations with ambiguous political goals is still a contentious topic today with some authors calling for a return to the Powell and Weinberger doctrine of only using decisive force in attainment of only "vital national security interests." However, joint doctrine and theorists such as Echevarria, embrace the ambiguity that limited contingency operations present as a reality, which makes Pershing's conduct during his campaign into Mexico vital for study when considering an operational approach in a limited contingency operation.⁶⁹

⁶⁹ Stephen M. Walt, "Applying the 8 Questions of the Powell Doctrine to Syria," *Foreign Policy*, last modified 3 September, 2013, accessed 4 February, 2016, <http://foreignpolicy.com/2013/09/03/applying-the-8-questions-of-the-powell-doctrine-to-syria/>.

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